
HeLIN Pilot Mentoring Scheme

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ABSTRACT

THE HEALTH CARE LIBRARIES UNIT COORDINATES, FACILITATES, and promotes continuing personal development for all staff in the Health Libraries and Information Network (HeLIN) of the Oxford Deanery (UK). It supports the development of a culture of lifelong learning and recognizes that CPD should help deliver organizational objectives, as well as enabling all staff to expand and fulfill their potential.

A major emphasis for 2000 was to investigate ways of improving support for individual learning within the workplace. The group identified a need to build on existing informal support networks in order to provide additional learning opportunities and decided to investigate the feasibility of piloting a mentoring scheme.

The objectives of the pilot were to increase understanding and knowledge of mentoring as a tool for CPD; to investigate existing mentoring schemes and their applicability for HeLIN; to develop a pilot mentoring scheme for HeLIN incorporating a program for accreditation of mentors; and to evaluate the scheme and disseminate the results.

In order to identify current practice in this area, a literature review was carried out, and colleagues with an interest in or existing knowledge of mentoring schemes were contacted where possible. In the absence of clearly defined appraisal tools, all abstracts were read, and articles that met the following criteria were obtained and distributed to the group for review. Few

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reports of mentoring schemes that fit our regional context were found, most being organizationally based, with a small number of formal programs in libraries and little activity in the health-library setting.

A semistructured pilot mentoring scheme was introduced, which would focus on providing support to a wide range of HeLIN members, including midcareer librarians who wanted support in restructuring their career or who were facing changing roles and tasks and needed help structuring their learning. A set of guiding principles were produced, and the scheme advertised and promoted widely. Recruited mentees were matched with mentors, and initial contacts were undertaken.

As part of the scheme, an accreditation program for mentors was organized. Mentors undertake a flexible and learner-centered six-month course in order to achieve the City and Guilds Mentoring Award. The program includes attendance at workshops that underpin participants' knowledge and understanding, provide a forum to raise and discuss issues, and also provide a valuable support network for mentors. Individual meetings with learners also provide guidance, support development, assessment, and practical experience of mentoring sessions.

A midpoint process evaluation has been undertaken to make sure that individuals' needs are being met and to reassess and reprioritize the meetings program. A full evaluation will be conducted following the conclusion of the initial mentoring award program. This will assess whether the program is reaching its target population and whether the program meets the individual objectives of participants.

BACKGROUND

The Health Care Libraries Unit (HCLU), based in the University of Oxford, coordinates, facilitates, and promotes continuing professional development (CPD) for all staff in the Health Libraries and Information Network (HeLIN) of the Oxford Deanery (UK). HeLIN is a cross-sectoral, cooperative federation of libraries and information units that aims to enhance the ability of each member to provide quality library and information services to the health care community it serves, by resource-sharing and other cooperative efforts. The network has been in existence for over thirty years and includes libraries in acute hospital trusts, psychiatric hospital trusts, health authorities, the primary health care community, and higher education institutions. It supports the development of a culture of lifelong learning, and recognizes that CPD should help deliver organizational objectives, as well as enabling all staff to expand and fulfill their potential.

A major emphasis of the CPD strategy for 1999/2000 was to investigate ways of improving support for individual learning within the workplace, particularly for staff at midcareer stage. The HCLU identified a need to build on existing informal support networks, in order to provide addition-

al work-based learning opportunities, and decided to investigate the feasibility of piloting a mentoring scheme.

HEALTH CARE LIBRARIES COORDINATION

The principles of HeLIN, on which all HCLU's work is based, are focused on the sharing of resources and best practice in library and information management, thereby extending the resources available for users of individual libraries. Expertise and experience is shared both individually and through more formal mechanisms such as a quarterly forum and time-limited, task-focused Special Interest Groups (SIGs).

A key target is to present a positive, proactive image for library and information services and to strive for representation on relevant committees and working groups within the home organization and further afield, in order to ensure that library issues are seen to be an integral part of the delivery of health care. Members of the network work together to develop a strategic approach to developing services in the most appropriate way. This work is underpinned by a commitment to continuing professional development and includes an element of horizon-scanning for intelligence on developing trends and on the increasing need for new skills and competencies.

PROFESSIONAL DEVELOPMENT GROUP

Increasingly, professionals can rely no longer on their initial training and qualification to see them through their careers, and the impact and demands of continual change could be seen as daunting to the midcareer specialist.

The HeLIN Professional Development Group (PDG) is a SIG designed to coordinate, facilitate, and promote continuing professional development for HeLIN staff, and aims to support all members through this continual process of change and development. It consists of seven core library and information staff from within the region, all with an interest in training and development. It has representation from all parts of the region and from all grades of staff, encompassing a wide range of experience, expertise, and specialist knowledge. The group is chaired by the assistant director of HCLU, who has prime responsibility for the role and remit of the group.

Building on the success of the Librarian of the 21st Century program (Palmer, 1996), the role of the group is both strategic and pragmatic, anticipating and identifying development needs and ensuring that new skills and knowledge are maintained in order to facilitate innovation and development of services at a local level.

The aims of the Professional Development Group are:

- To identify the common training and development needs of all HeLIN staff.

- To provide and promote a program of training events to meet common identified needs.
- To identify and promote training opportunities that are available at local and national level.
- To enable newly qualified librarians to obtain professional certification.
- To raise awareness of opportunities for further qualifications.
- To promote the continuing professional development of library and information staff at trust, health authority, and regional level.
- To evaluate the work of the PDG.

The main objectives and methods for the group are based on these aims, which are reviewed in an annual strategy and action plan to ensure they are relevant and appropriate. The annual program of events reflects the three key areas of knowledge, skills, and attitudes, and aims to ensure that all library staff in the region are enabled to do their job, to be aware of broader developments within the field, and to enhance their roles within their organizations.

The strategy links in with UK National Health Service guidance as outlined in HSC 99 158 "Continuing Professional Development: Quality in the new NHS" (1999) in the support of high quality care and clinical governance. It supports the development of a culture of lifelong learning, and recognises that CPD should help deliver the health outcomes and priorities of the NHS as outlined in the NHS Plan (2000), by enabling all staff to expand and fulfill their potential.

The Professional Development Group strategy links closely with the regional Critical Appraisal Skills Finding the Evidence (CASPFew) program (Brice & Tomlin, 1998), which aims to facilitate the provision of high-quality information and knowledge-management skills education for health professionals. This recognizes that appropriately skilled and flexible library and information staff are crucial in supporting the lifelong learning of all NHS staff.

Responsibility for Learning

The Professional Development Group initially identified five levels of responsibility for learning: personal, library, organization, regional, and professional body, with the key responsibility of the group primarily at the regional level. Clearly the group must operate within a complex environment and also must ensure that the work it undertakes is appropriate to its role and function. A systematic approach is therefore appropriate to the planning both of the overall program and of individual events. The steps of such an approach are summarized in the following list:

- Identify the need.
- Decide what type of learning method would be most appropriate.
- Decide who would be the best person or body to deliver it.

- Decide on where and when, and for whom.
- Commission local or external trainers.
- Decide what level of evaluation should be undertaken.
- Plan and deliver event or program.
- Evaluate event or program and feedback into needs analysis.

However, it has become clear that initiatives undertaken at the regional level can act as a crucial catalyst for personal learning. The main function of the group—that of providing tailor-made CPD events, which members would be unable to receive solely from within their employing organizations—has naturally expanded into the development of schemes to support work-based learning. It is understood that all of the library services offered via their host organization will have access to some learning support such as local appraisal schemes, local training events, and opportunities for multidisciplinary learning. As a general rule, responsibility for providing training in generic IT or management skills would also be regarded as the responsibility for the employing organization. However, the group felt that work-based programs, such as mentoring, required specialist knowledge and experience not normally found within the host organization and that therefore a regional scheme could provide a useful service to members.

Training Needs

Development and growth demands a continual commitment to nurture and improve skills and experiences to achieve maximum potential. As a personal aspect of work, such development and growth should be enjoyable and motivating, enabling the achievement of both individual and organizational aims and objectives, building each time on newly developed skills and knowledge. However, the group was concerned that much of the data obtained on training needs was informal and that relying too heavily on assumptions might lead to unidentified training needs. A more robust approach was needed in order to make the identification of training needs more systematic. In early 1999, a review of the literature was undertaken and existing training needs-analysis questionnaires were examined. A list of core competencies was developed, from which a training needs questionnaire was designed and distributed to all members of library staff in the region. This questionnaire categorized competencies required by staff into the two main headings of professional and transferable skills, and then into key areas such as information retrieval, resource and collection management, human resource management, and personal and professional development. These categories were then further broken down into separate competency areas such as literature searching, negotiation skills, or data collection. Library managers were asked to distribute the questionnaires to their staff and to ensure that the guidance on completing the form was clear and understood. Contact details for the group were given with the forms to allow for further support or clarification.

The results of the questionnaire were analyzed, and key areas were addressed in the strategic plan for 2000. Key findings from the analysis indicated that, as well as a perceived need for all grades of library staff in new and emerging technologies and an interest in trends and developments within the NHS, there was a clear need expressed for more work-based and flexible continuing professional development opportunities, particularly among midcareer staff.

Demographically, a recent national training census has confirmed that 45.3 percent of those respondents from the Oxford Deanery expressing a preference for a training method did so for work-based learning (Maynard, Kinnell, White, & Lianghzi, 2001). The results from these surveys provided a further rationale for the investigation of work-based schemes.

Individual Learning within the Workplace

Existing work-based schemes have usually focused on the support of new entrants to the professions, and this needed to be readdressed. Two distinct key areas were therefore identified as objectives for the 1999/2000 strategy. The first was to set up a program that encouraged members to take responsibility for their personal development planning, or portfolio development, and the second was to ensure that work-based programs were designed to cater to the needs of midcareer staff as well as young professionals.

The process started with a training workshop entitled "Practical approaches to managing your development," organized for HeLIN by an independent management consultant in September 1999. This workshop was itself a sign of commitment to the principle of lifelong learning. It focused on giving participants a chance to reflect upon and strengthen what they felt that they were already doing well and to consider and appropriately adopt the best practices of others. As a result, learning and development would become a planned and deliberate, not an accidental or haphazard, process. The feedback from this event was very positive and confirmed interest in and support for piloting a mentoring scheme within the region.

THE PILOT MENTORING SCHEME

Objectives

The objectives of the mentoring pilot were to increase understanding and knowledge of mentoring as a tool for CPD; to investigate existing mentoring schemes and their applicability for HeLIN; to develop a pilot mentoring scheme for HeLIN incorporating a program for accreditation of mentors; and to evaluate the scheme and disseminate the results.

Methods

In order to identify current best practice in this area, a literature review was carried out, and colleagues with an interest in or existing knowledge of mentoring schemes were contacted where possible. Searches were conducted in LISA (Library and Information Science Abstracts), Medline,

Cinahl (a nursing and allied health database), and on the Internet, using two major search engines.

In the absence of clearly defined appraisal tools, all abstracts were read, and articles that met the following criteria were obtained and distributed to the group for review. The criteria were that:

- The scheme was relevant to the needs of librarians.
- The scheme was not restricted to employees within a single organization.
- Mentors were not line managers.

Few reports of mentoring schemes that fitted our regional context were found, most being organizationally based schemes, with a small number of formal programs in libraries and little activity in the health-library setting. The scheme described as operating within the Australian Library and Information Association was considered to offer the closest model to HeLIN.

A semistructured pilot mentoring scheme model was chosen, that would focus on providing support to a wide range of HeLIN members, including midcareer librarians who wanted support in restructuring their career, or were facing changing roles and tasks, and needed help structuring their learning. A set of guiding principles was produced, and the scheme was advertised and promoted widely, using flyers, mailing lists, and briefings. Following recruitment of those interested in the scheme, a matching process was undertaken, and initial contacts were made.

Definition and Principles

A working definition of mentoring and key principles on which the scheme would be based were established. These principles were heavily influenced by the work achieved by Ritchie and Genoni (1999), and in particular by the critical success factors outlined within that paper. The definition of a mentor, based on the work of the external consultant was: "Mentors are influential people who significantly help you reach your major life goals" (Gibbons, 2000).

The characteristics of the HeLIN scheme were that it would:

- Be immediately responsive to individual learning needs.
- Create a safe learning environment.
- Address career and psychosocial development needs.
- Guarantee confidentiality and personal recognition of individuals' successes and achievements.
- Assume that individuals carry basic responsibility for their own development.

The process would offer support and development opportunity to both mentor and mentee by:

- Being a two-way learning relationship.
- Enabling goals to be determined by concerned individuals.

- Developing over time.
- Supporting lifelong learning.
- Allowing for the updating of individual learning of mentee.
- Offering structured learning opportunity for the mentor.
- Allowing for diversification to a new area within a field.

Particular aspects of the HeLIN scheme that the group felt would be critical included ongoing support for both mentors and mentees, in particular training in the skills of mentoring.

Recruitment of Mentors and Mentees

It was agreed to recruit into the program six to eight mentor participants, from all levels of library staff. The pilot scheme would involve using the external consultant both to support mentors and to supervise their accreditation for a City and Guilds short award in mentoring. The support process would involve running two to four workshops for mentors jointly and would also allow for meetings with mentors on a one-to-one basis. The cost of running the scheme and for formal accreditation would be met jointly by HLCU and the mentor's own organization.

A flyer to attract candidates was posted on *lis-hclu*, HeLIN's electronic mailing list, and this received a good response particularly from potential mentors. Initially, it appeared there would be a shortfall of mentees, and this was compounded by the need for each mentor to have two mentees in order to meet the requirements of the accreditation process. The mentoring scheme was also advertised and discussed at the HeLIN Forum (a regular meeting held for regional library managers). In addition a further flyer—this time distributed by a physical mailing to all libraries—was sent out in order to recruit more mentees and this received a good response with fourteen further potential participants. This part of the recruitment process stressed that the scheme was for all library staff and not just for new entrants to the profession, as the group was keen to make sure that all potential midcareer participants were aware that they could benefit from taking part as either a mentor or mentee.

The promotional material stressed the opportunity for work-based learning, and suggested that becoming a pilot mentor would result in:

- A tangible award—nationally recognized, externally accredited.
- The opportunity to develop transferable skills (not confined to mentoring or libraries only).
- The opportunity to be seen as people interested in the development of others.
- A chance to be part of a small learning set—providing an opportunity to share and pool learning from others interested in the same issues.

In return, mentors would be asked to:

- Commit to finding the time to devote to their own development and that of their mentees for approximately six months.
- Attend three or four one-half day workshops in order to underpin knowledge and understanding and to provide a forum to raise and discuss issues.
- Hold individual sessions with the assessor in order to receive guidance and support and to provide an opportunity for assessment.
- Match funding provided by the PDG in order to be officially registered and assessed under the City and Guilds mentoring award.

In order to attract mentees, the material aimed to recruit from a wide range of potential participants, including:

- Anyone moving into a new post or role.
- Anyone interested in their own development and seeking an interested person to help them, from whom they could seek advice, support, and interest.
- Anyone interested in having a structured basis for accelerated learning.
- Anyone seeking chartership (i.e., professional accreditation).

As it had been stressed that mentees must also have the agreement of their line managers in order to take part, it was decided to hold a briefing session for all concerned before the pilot commenced.

The briefing session held for all interested parties, facilitated by the external consultant, took place in March 2000. This was a useful opportunity for any general concerns to be discussed and questions raised and answered.

Matching

The next step in the program was to confirm who was taking part and then to match up each mentor with two mentees. This proved to be a difficult process. In the promotional material it had been stated that potential participants may either already have someone in mind who they thought would make a suitable partner, or that they may be interested in being matched up with a potential partner, remembering that for the purposes of the accreditation process mentors would need to have two mentees in order to be assessed. The external consultant had already advised the HCLU that matching was a crucial activity and needed to be considered carefully. Maintaining a balance between the preferred ideal of self-selection and the alternative practicalities in providing a service to match partners had to be monitored carefully.

Firstly, all mentees were contacted to see if they had any preference for any particular mentor. This process also established if the mentees had any particular interests or needs. For example, it became clear at this stage whether potential mentees were interested due to their moving into a new

post or whether they had been established in a post for a while and just wanted someone to help them focus on future development. Approximately half of all potential mentees and all of the potential mentors were classified as midcareer specialists. One of the mentees was new to librarianship and from a different profession (nursing) and wanted guidance on reviewing his or her learning methods, as he or she felt that previous learning strategies were no longer effective.

Some of the responses received from both potential mentors and mentees show a wide range of motivations for joining the scheme:

- "I like the idea of having a mentor—as an encouragement, to help keep track with development and as someone to talk things over with, ideally a confidante able to discuss anything."
- "I would like to be a mentee please! I have opted to be a part of the scheme because I really believe in the ethos behind mentoring, and I think that it has enormous potential value in many situations. As I said, I think that a mentor is exactly what I could have done with at sixteen!"
- "I have reached a key transition point in my life and career. I want to take both onto another sphere but at the moment my path is uncertain and I could really do with some guidance!"
- "I do not have anybody particular in mind as a potential mentor, but I have a vision of somebody objective, probably older/more experienced career-wise than me with some worldly wisdom to offer!"

One potential participant volunteered to be both a mentee and mentor, which although it was considered feasible in theory, was discouraged in this instance due to the time-consuming nature of the accreditation process in the early part of the scheme.

Another interesting point was raised following an application from one library in the scheme where the library manager wanted to be mentored and their assistant offered to be a mentor (but not to each other!). The matching process was finally concluded, following a lengthy and somewhat sensitive process, and the support programs began.

Support for Mentors

The accreditation program for mentors involves a six-month support process, which provides a flexible and learner-centered approach to achieving the City and Guilds mentoring award. The program includes attendance at workshops designed to underpin participants' knowledge and understanding, to provide a forum to raise and discuss issues, and also to establish a valuable support network for mentors. Individual meetings with learners also provide guidance, support development, assess progress, and witness mentoring sessions in practice.

To date, four workshops have been held, and the mentors are awaiting assessment. One of the key initial learning exercises undertaken in the

first workshop was a mentoring diagnostic activity. This involved mentors reading a series of statements and selecting those that represented areas of work that they individually feel that they need to address. Mentors are also encouraged to record learning points during the sessions and to keep a log of their meetings and activities. A copy of the mentoring diagnostic can be found in the appendix to this article.

Support for Mentees

An informal meeting for mentees was held early on in the scheme, in order to get their views on how their mentors were progressing and to raise any issues on and around the mentoring process. The external consultant used the meeting to establish what mentees thought were the specific characteristics and behaviors of the most competent mentors and to get views on how to get most from mentoring efforts.

The HCLU did attempt to pilot the use of a Web-based workspace for the mentoring group using the BSCW server (<http://bscw.gmd.de>) as a supplementary method of keeping in touch using shared folders. This did not prove very popular on this occasion, due to the difficulties in maintaining confidentiality when staff have to share workstations, but may be developed in the future as the infrastructure within NHS libraries improves.

Process Evaluation

A midpoint process evaluation has been undertaken to make sure that individuals' needs are being met and to reassess and reprioritize the meetings program. A full evaluation will be conducted following the conclusion of the initial mentoring award program. This will assess whether the program is reaching its target population and whether participants are satisfied with the program and are meeting their individual objectives.

Discussion

It is important to remember that this is still a pilot scheme. Although not hard to administer once up and running, the initial administration and matching process was extremely time-consuming, and had to be handled very sensitively. Once partners are matched, they take responsibility for arranging their own meetings; however, there are still some central tasks in arranging support meetings and generating feedback. This is essentially a coordination task rather than a controlling one.

Throughout the pilot so far, a number of issues have emerged that may inform future developments. Firstly, we did have a problem with the lack of potential mentors, the main barrier being the time commitment. One mentor who left the scheme summed it up thus: "Although I would love to give mentoring a go, I feel at the moment that I am really overloaded at work as it is and would be reluctant to take on the responsibility and not feel confident that I could give somebody the necessary commitment in terms of time and focus." However, feedback from those who have contin-

ued shows that there are many benefits to being involved in the scheme, not least in helping both partners with their continuing professional development and in learning of new skills. Although initial perceptions of the scheme are that it is about giving on behalf of the mentor, our experience shows that it is, in fact, a two-way learning process.

The external consultant has stressed that, although it is possible to develop mentor competence, those who possess a "platform of existing or potential interpersonal skills" provide a firmer basis for further development. This has proved a useful and motivating reinforcement of confidence for some of our midcareer specialists, faced with an uncertain future and massive technological and social change.

Most participants are not keen on the terms "mentor" and particularly "mentee," although no consensus has emerged over alternatives.

A further issue to consider is that of drop-out. We have had a small number of mentees leave the region for new appointments, and as mentioned above, one mentor withdrew from the scheme. One mentor has been investigating "e-mentoring" with one of the mentees who left the region, but for purposes of the accreditation process they require further face-to-face contact. E-mentoring raises a number of additional issues, which will be considered as part of the final evaluation process. It must be remembered at all times that the scheme is voluntary.

One factor present in the current job market is that an increasing number of appointments are made on a fixed-term basis, even for experienced professionals. Informal feedback from some participants has suggested that having a mentor outside the employing organization, providing support and help in deciding objectives and future work plans, can overcome some of the concerns created within such an unstable environment.

There are also issues of confidentiality, and the satisfactory agreement of boundaries and ground rules between individual partners. It had been decided at an early stage that the scheme would not have a written code as such, with each pair setting their own codes and ground rules; however, the scheme does need to be accountable in terms of nondiscriminatory practice and other regulatory frameworks. For our current mentors, these issues are covered through the accreditation award process.

The midpoint evaluation did confirm that the pilot scheme was offering opportunities for midcareer library and information professionals to benefit from either the learning opportunities provided by becoming a mentor or by being mentored themselves at a time of increasing demands on their capacity to manage change. Professional development is cyclical and continual, and whether we like it or not, it is our future!

APPENDIX

A mentoring diagnostic activity—which are true of you?

Read these statements carefully, and select with a “yes” those that you need to work hardest upon.

1. I listen to the whole issue before commenting.
2. I give advice but still expect the mentee to make their own decisions.
3. I always find time to help.
4. I always question thoroughly to find the real issues.
5. I always give honest opinions.
6. I have a good range of networks and contacts that can be utilized appropriately.
7. I am not intimidating—I'm easy to approach at any time.
8. I know what I am talking about—I am good at my own job.
9. I look for the reality within which a mentee works.
10. I always focus on mentee needs during a mentoring session.
11. I don't get irritated by a mentee who doesn't get the point quickly.
12. I am an optimist.
13. I am encouraging.
14. I am always well prepared in advance.
15. I am a positive role model in terms of my own achievements.
16. I can help a mentee believe in their potential.
17. I am open to new ideas.
18. I know when to introduce options which may not have been considered.
19. I can challenge assumptions skillfully.
20. I am a positive person.
21. I possess great patience.
22. I am interested in people.
23. I am an active listener.
24. I am non-judgmental.
25. I feel comfortable about having my views challenged.
26. I am enthusiastic about mentoring.
27. I am very knowledgeable about developmental issues.
28. I am tolerant.
29. I don't expect a mentee to be like me.
30. I am prepared to learn with the mentee.
31. I can give feedback skillfully.
32. I can allow a mentee the freedom and confidence to make mistakes.
33. I see my mentees as equals.
34. I have sound judgement.
35. I am able to distance myself, and maintain objectivity.
36. I am keen to allow mentees to make their own decisions.
37. I keep in regular contact with those I mentor.

38. I take an interest in the individual mentee—I value their views and what they say.
39. I am able to probe beyond the superficial.
40. I can provide the space for a mentee to express their feelings.
41. I can draw out a mentees' ideas and I'm willing to use them.
42. I have a true passion for developing others, and really believe in the value of development.
43. I can avoid the temptation to direct conversation back to myself and my issues and experiences.
44. I can challenge constructively and directly to get to the heart of the matter.
45. I won't just tell a mentee what they want to hear.
46. I never appear keen to get a mentoring meeting over with and move on to the next thing.
47. I don't talk about my own achievements too much.
48. I have a genuine desire to empower.
49. I am responsive to my mentee.

Any learning points emerging from this?

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